

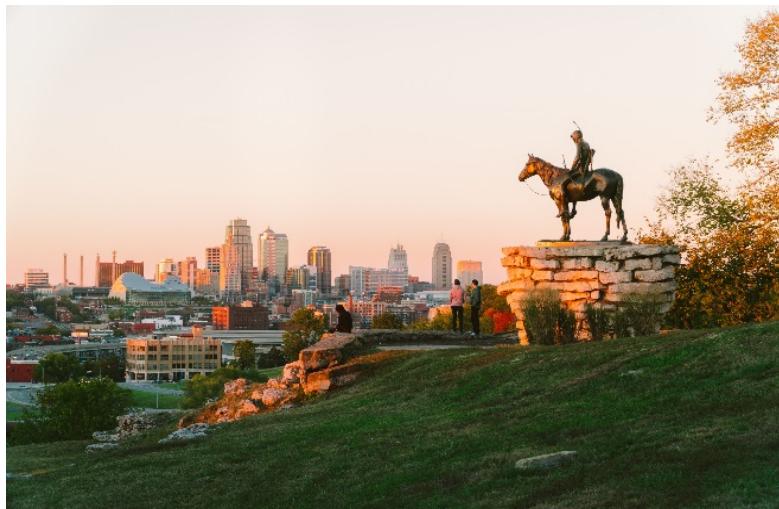


MISSOURI DIVISION OF TOURISM

MISSOURI SEPTEMBER TRAVEL BAROMETER
(DATA AVAILABLE AS OF 10/12/2021)



Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

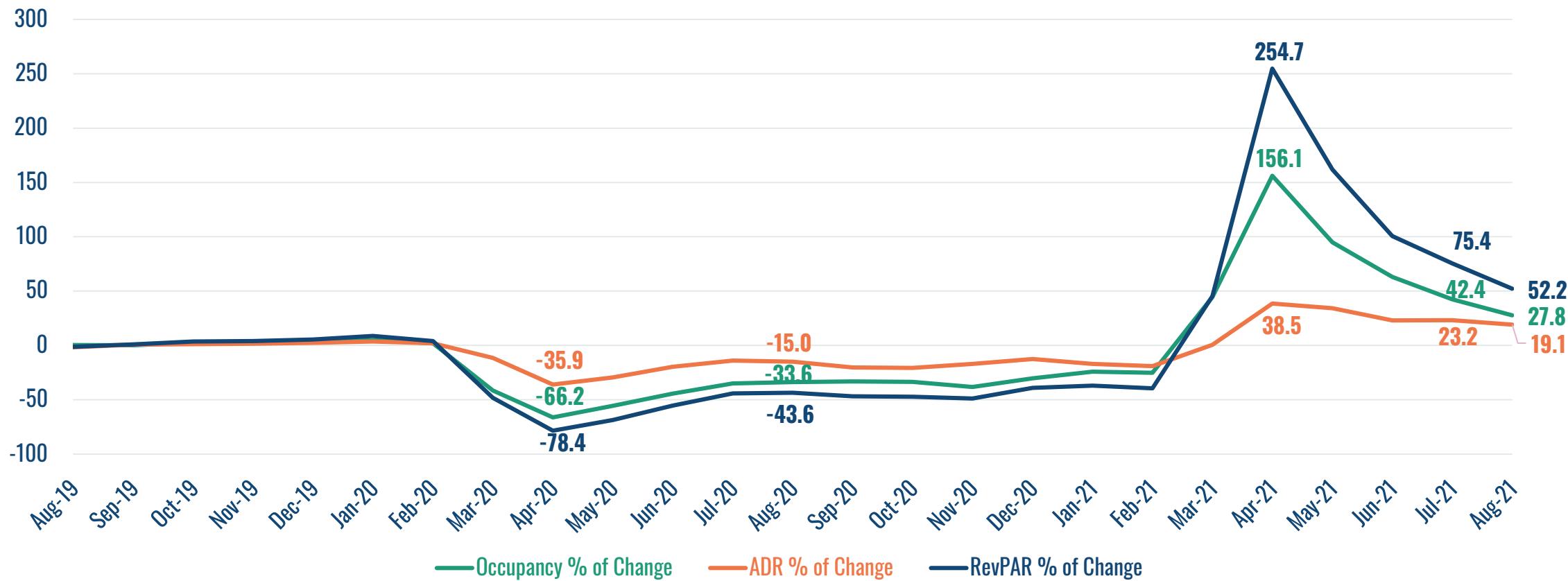
The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020



STR Monthly Lodging Trends Percentage of Change from Prior Year



Source: STR, LLC

Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

Missouri Travel Barometer



STR Lodging Trends – Week Ended October 2, 2021

OCCUPANCY
was up
37.9%
as compared to
the same week in
2020

STATEWIDE
DEMAND
INCREASED
39.8%

ADR
(Average Daily Room Rate)
INCREASED
39.8%

RevPAR
(Revenue per Available Room)
INCREASED
92.7%

Missouri Travel Barometer



AirDNA Short-Term Rental Trends for Entire Place Rooms

August 2021 Compared to 2020

OCCUPANCY
was down
-3.5%
as compared to
the time period in
2020

STATEWIDE
DEMAND
INCREASED
38.4%

STATEWIDE
SUPPLY
INCREASED
31.6%

RevPAR
(Revenue per Available Room)
INCREASED
7.1%

Missouri Travel Barometer



AirDNA Short-Term Rental Trends for Hotel Comparable Rentals

August 2021 Compared to 2020

OCCUPANCY
was down
-6.5%
as compared to
the time period in
2020

STATEWIDE
DEMAND
INCREASED
54.1%

STATEWIDE
SUPPLY
INCREASED
25.8%

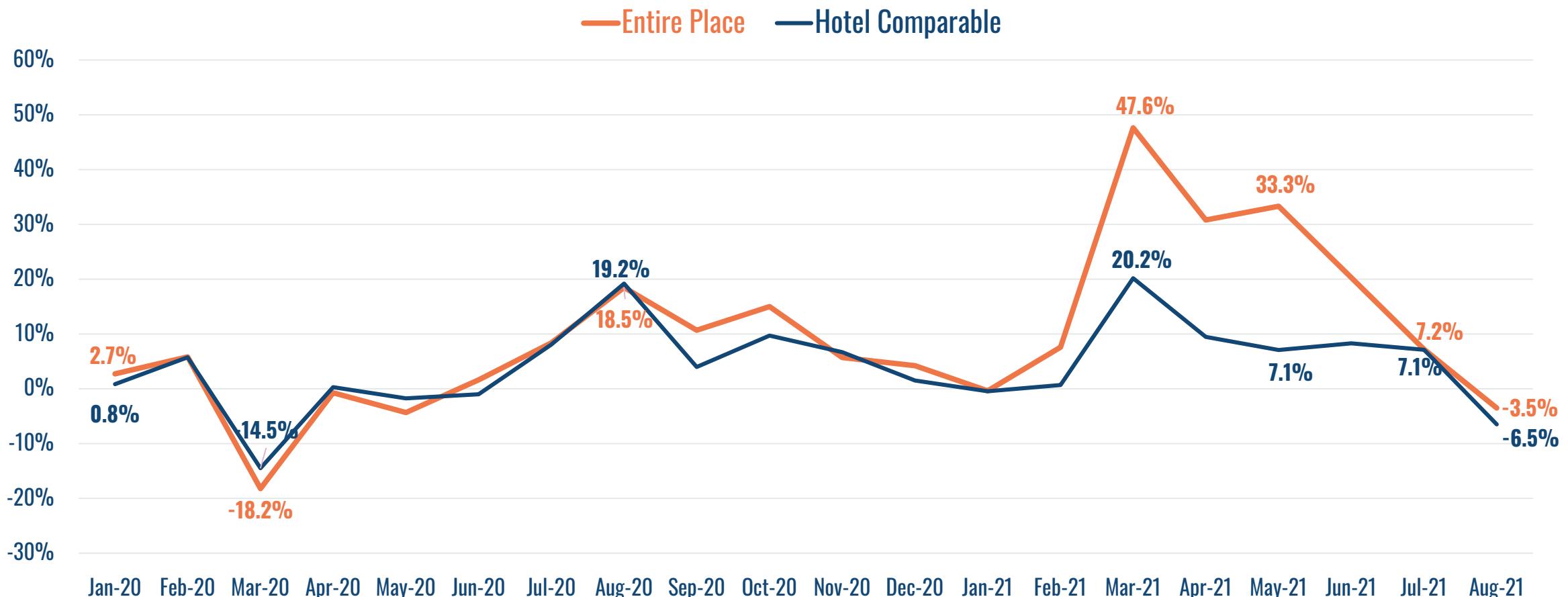
RevPAR
(Revenue per Available Room)
INCREASED
8.7%

Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29/2020

AirDNA Short-Term Rentals Occupancy % of Change from Prior Year



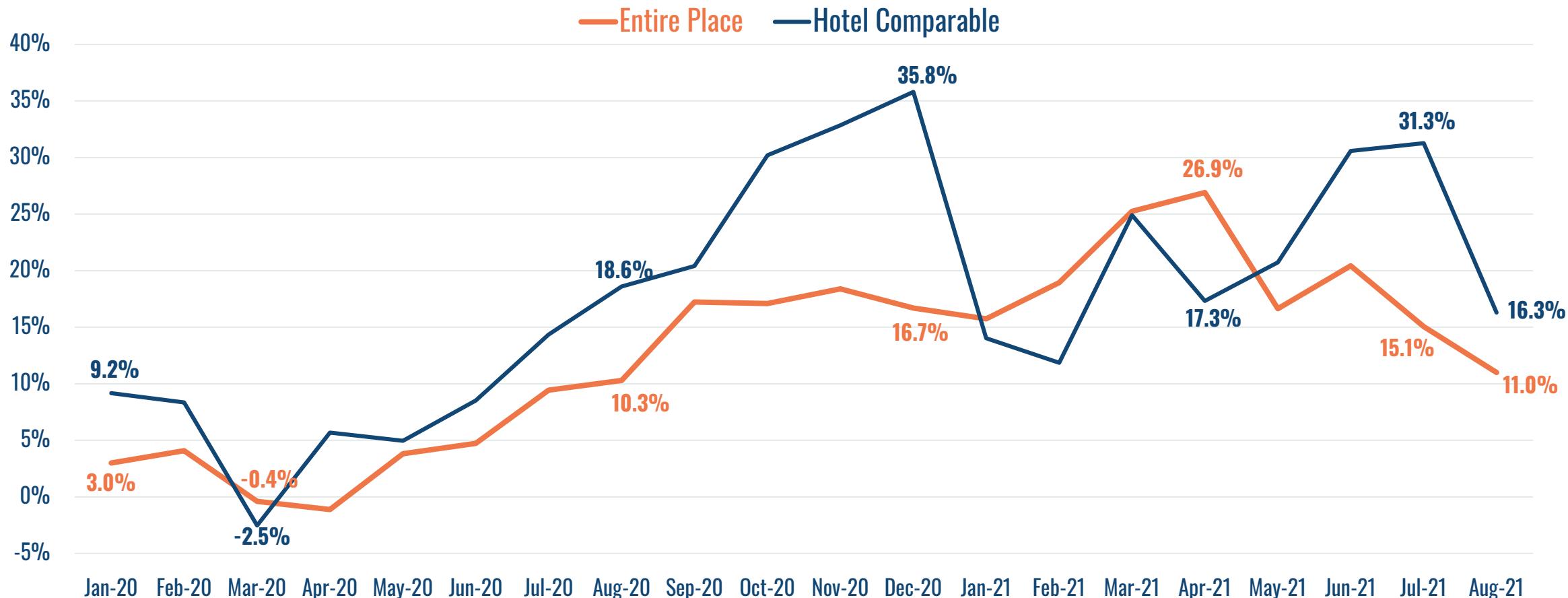
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway. Hotel Comparable Rooms are studio and one bedroom entire place rentals, which AirDNA believes are most likely to compete directly with hotels.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020



AirDNA Short-Term Rentals ADR % of Change from Prior Year



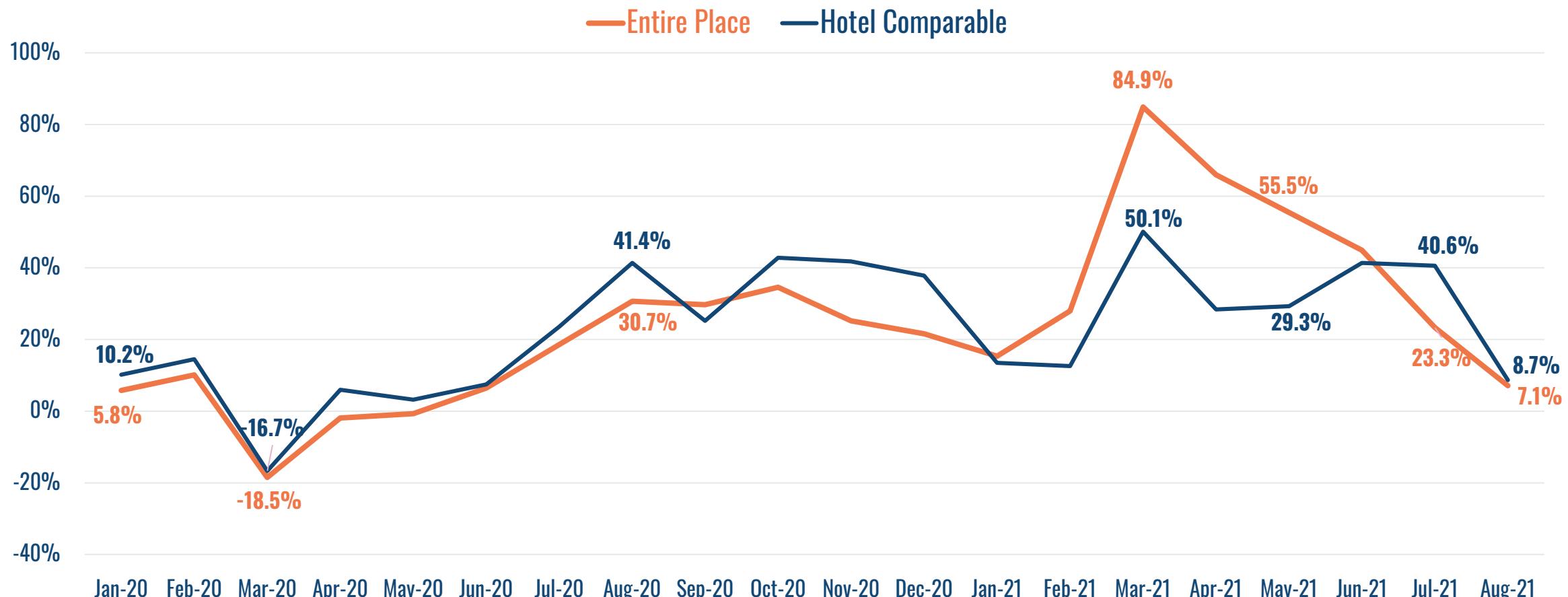
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Missouri Travel Barometer



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AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



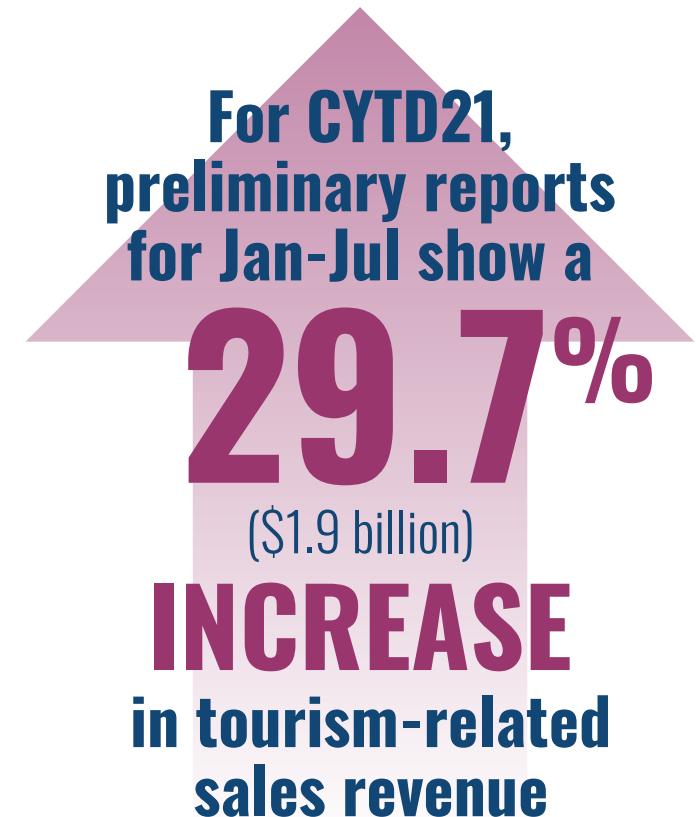
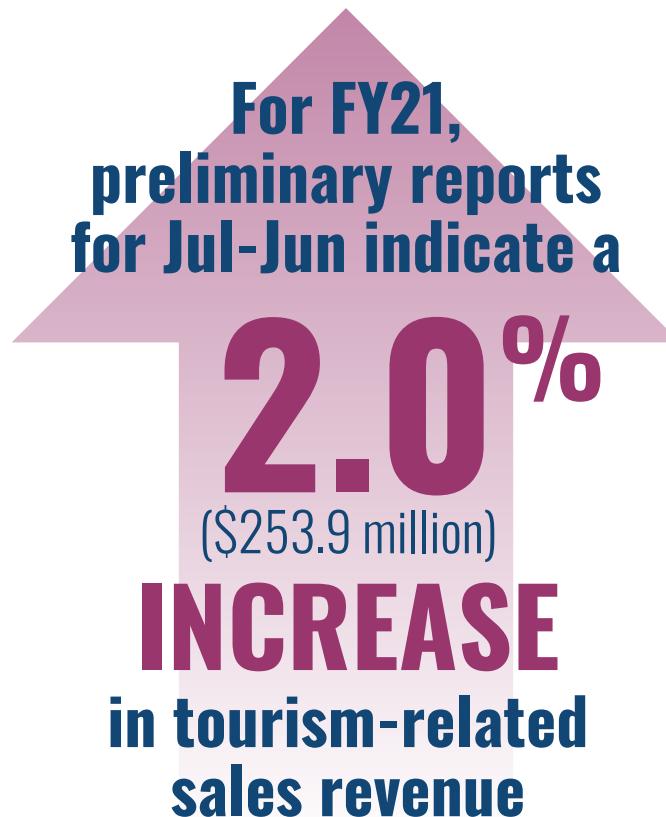
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Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales through July 2021

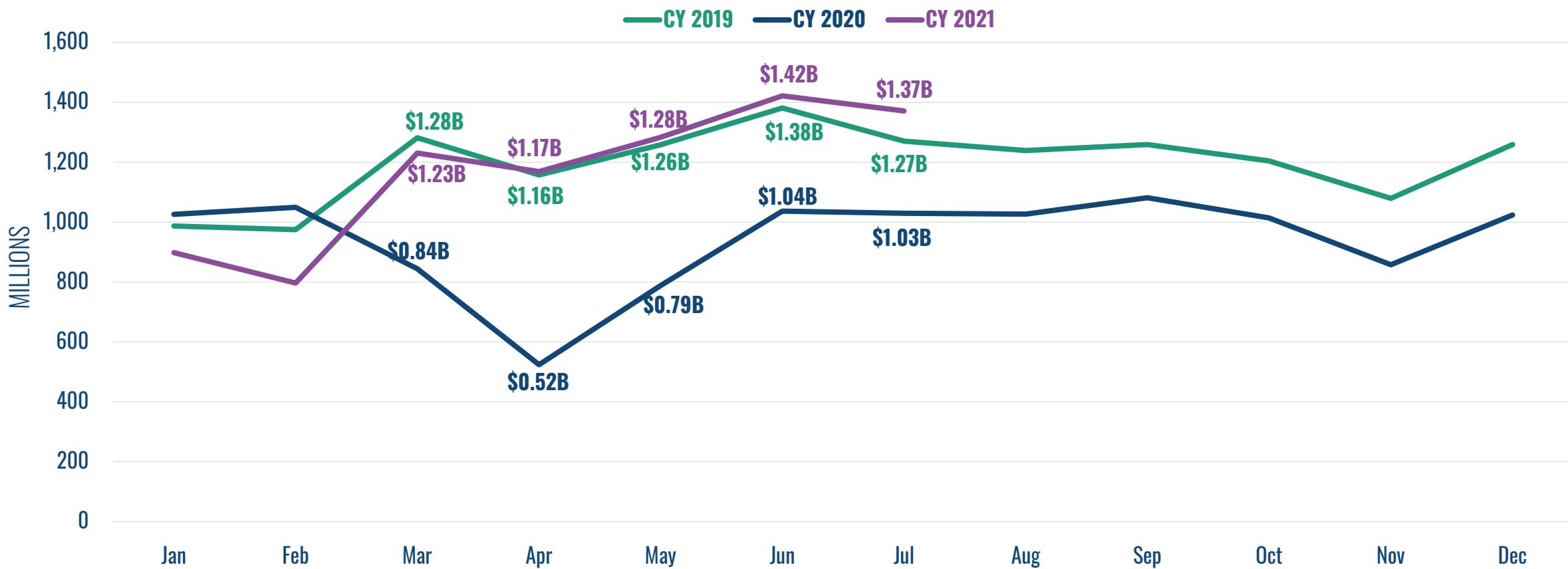


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CY Sales Revenue from Tourism-Related NAICS



Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CYTD Sales Revenue from Tourism-Related NAICS

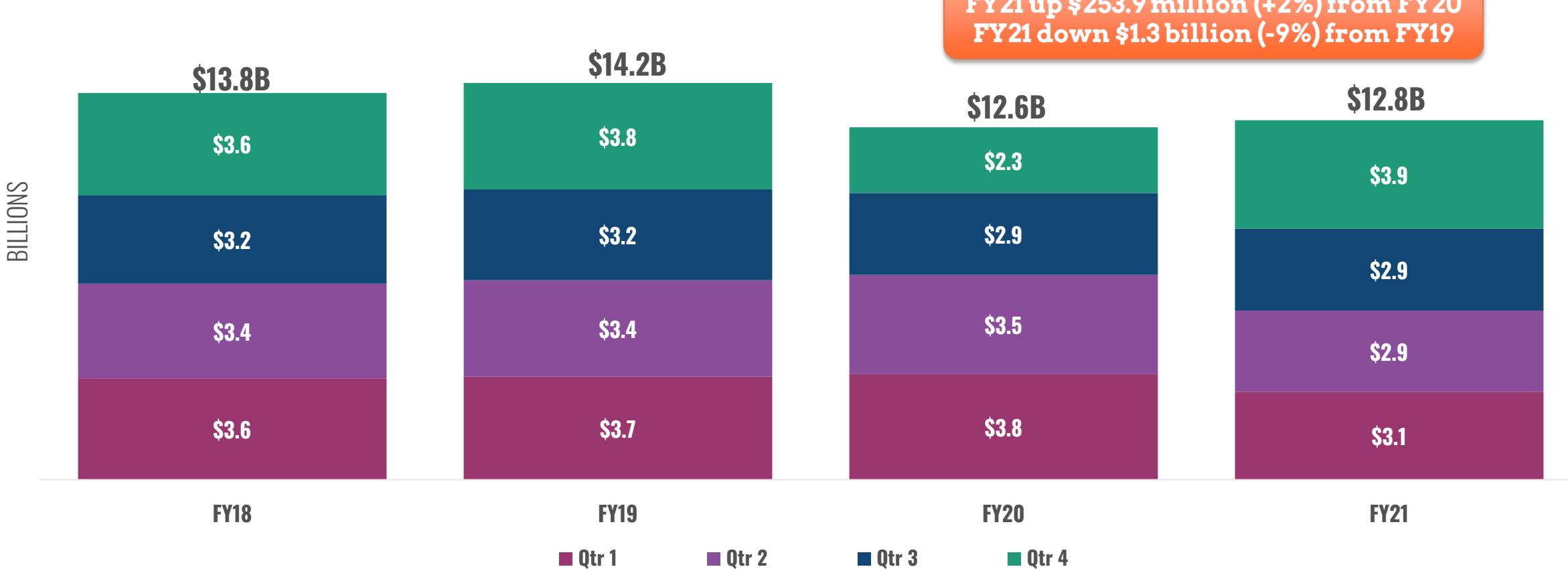


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



FY Sales Revenue from Tourism-Related NAICS



Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Sales by Business Type

% of Change During August 2020 – July 2021 Compared to August 2019 – July 2020

Places to Eat

Places to Stay

Things to Do



■ % of Change

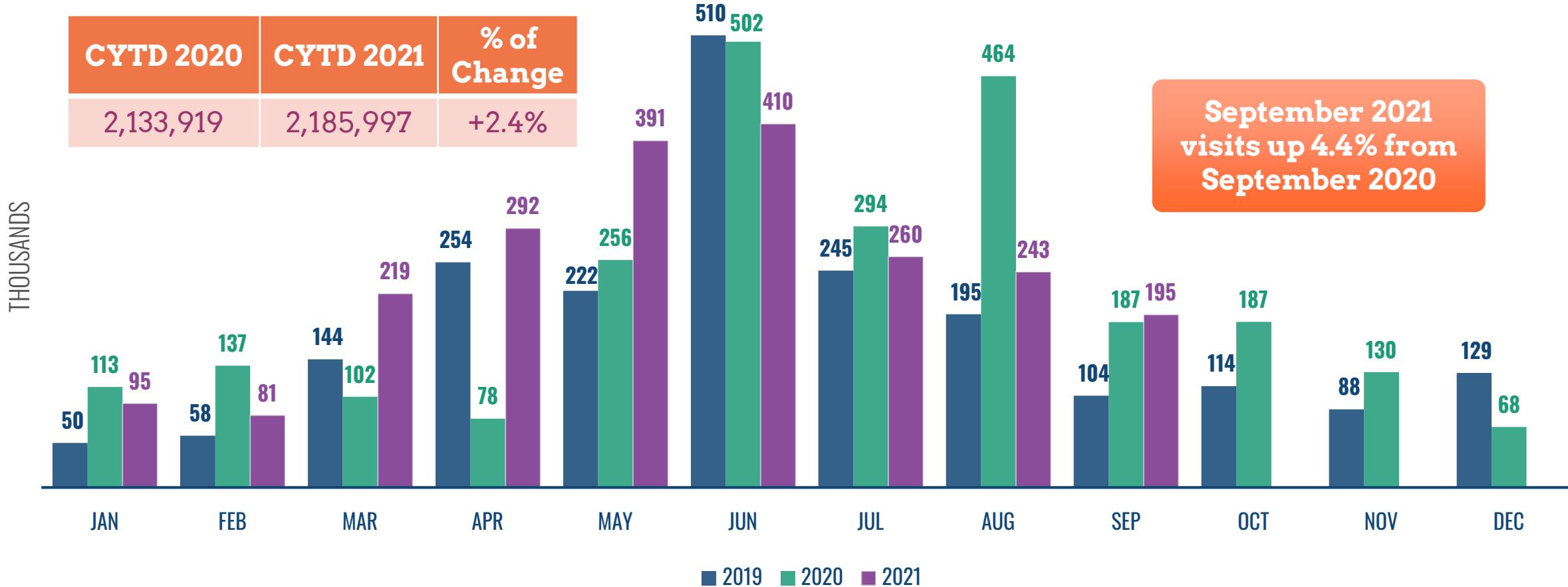
Source: Missouri Department of Revenue

Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal traffic patterns



Calendar Year Visits to VisitMO.com by Month

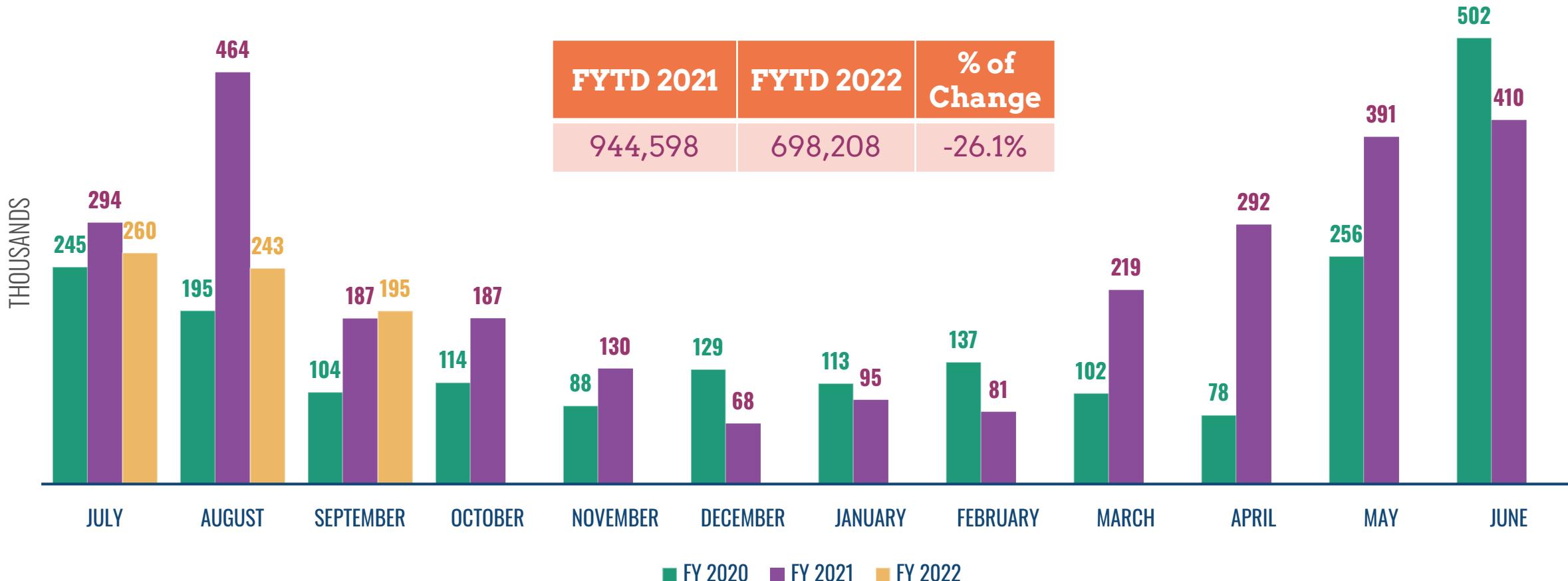


Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns



Fiscal Year Visits to VisitMO.com by Month

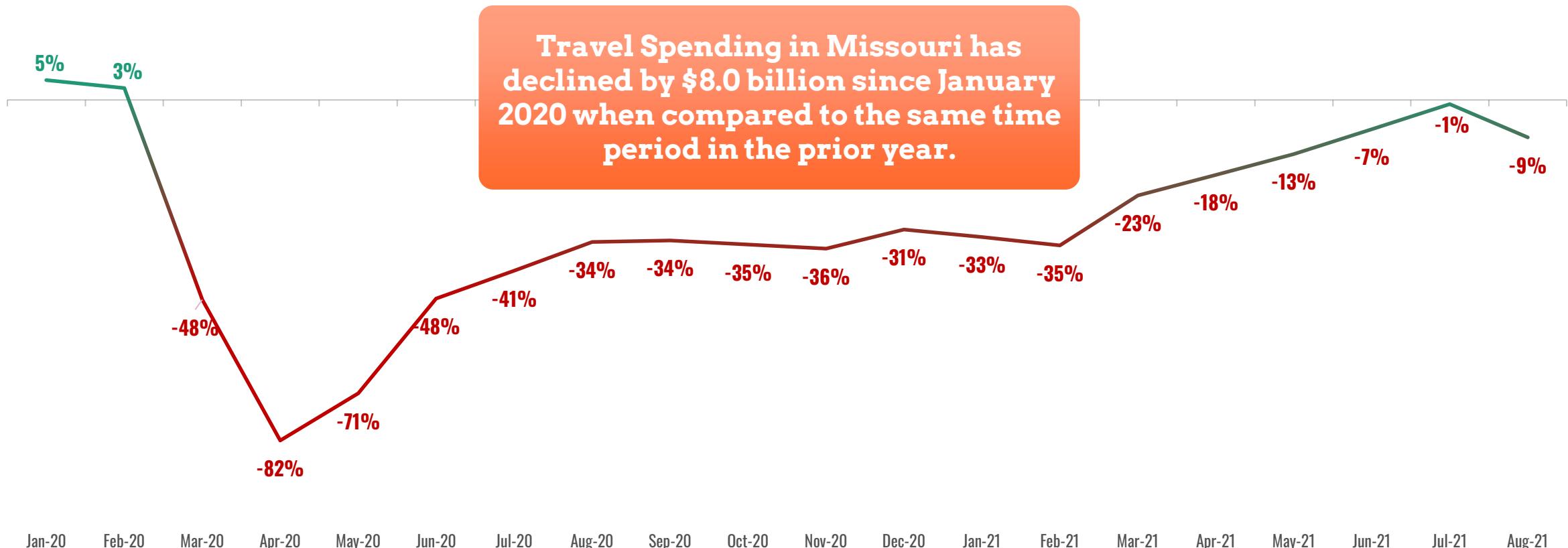


Missouri Travel Barometer



The effect of Covid-19 first hit the week ending 2/29/2020

Economic Impact % Change in Monthly Travel Spending in Missouri Compared to 2019



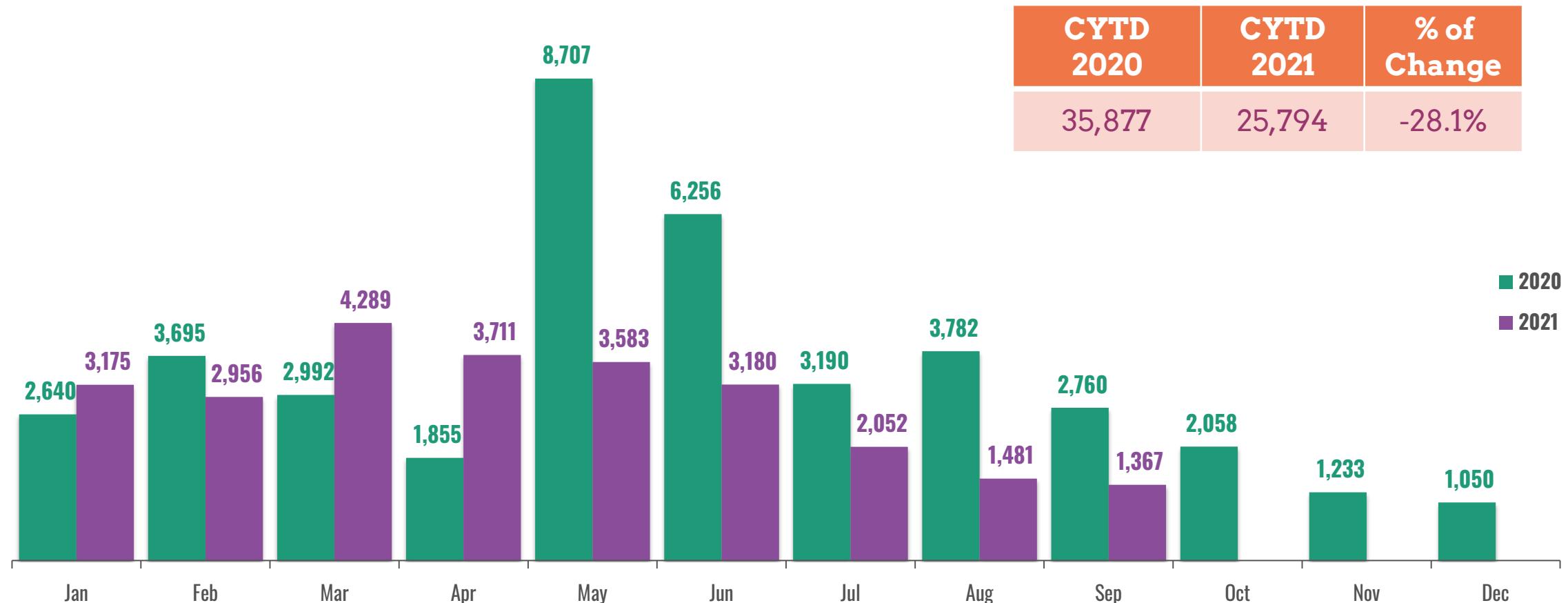
Travel Spending in Missouri has declined by \$8.0 billion since January 2020 when compared to the same time period in the prior year.

Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

Fulfillment of Travel Guide Orders from All Sources



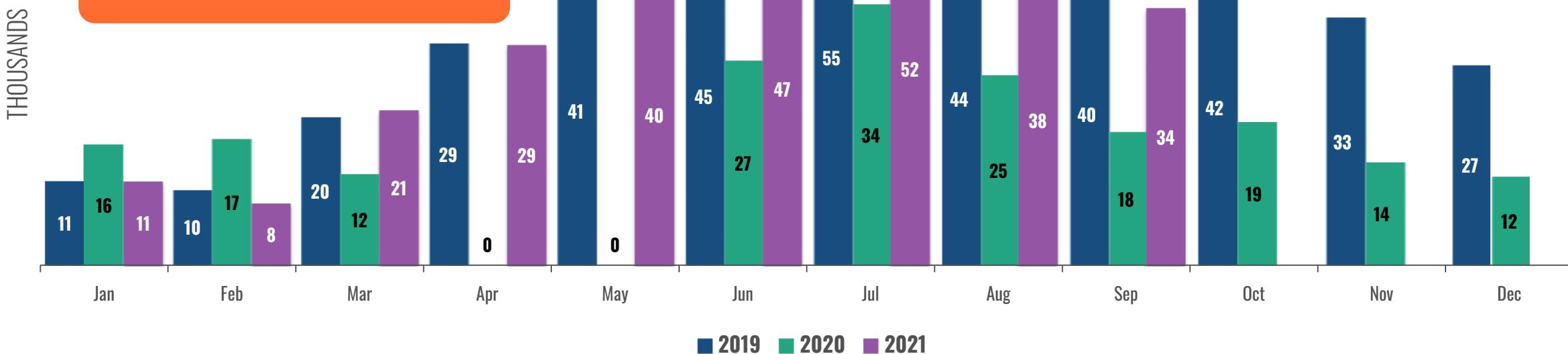
Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.

Missouri Travel Barometer



Welcome Center Visits: 2021 Calendar Year to Date through September

For CYTD 2021, the centers were up 88% for Jan – Sep 2021 compared to the same time a year earlier.

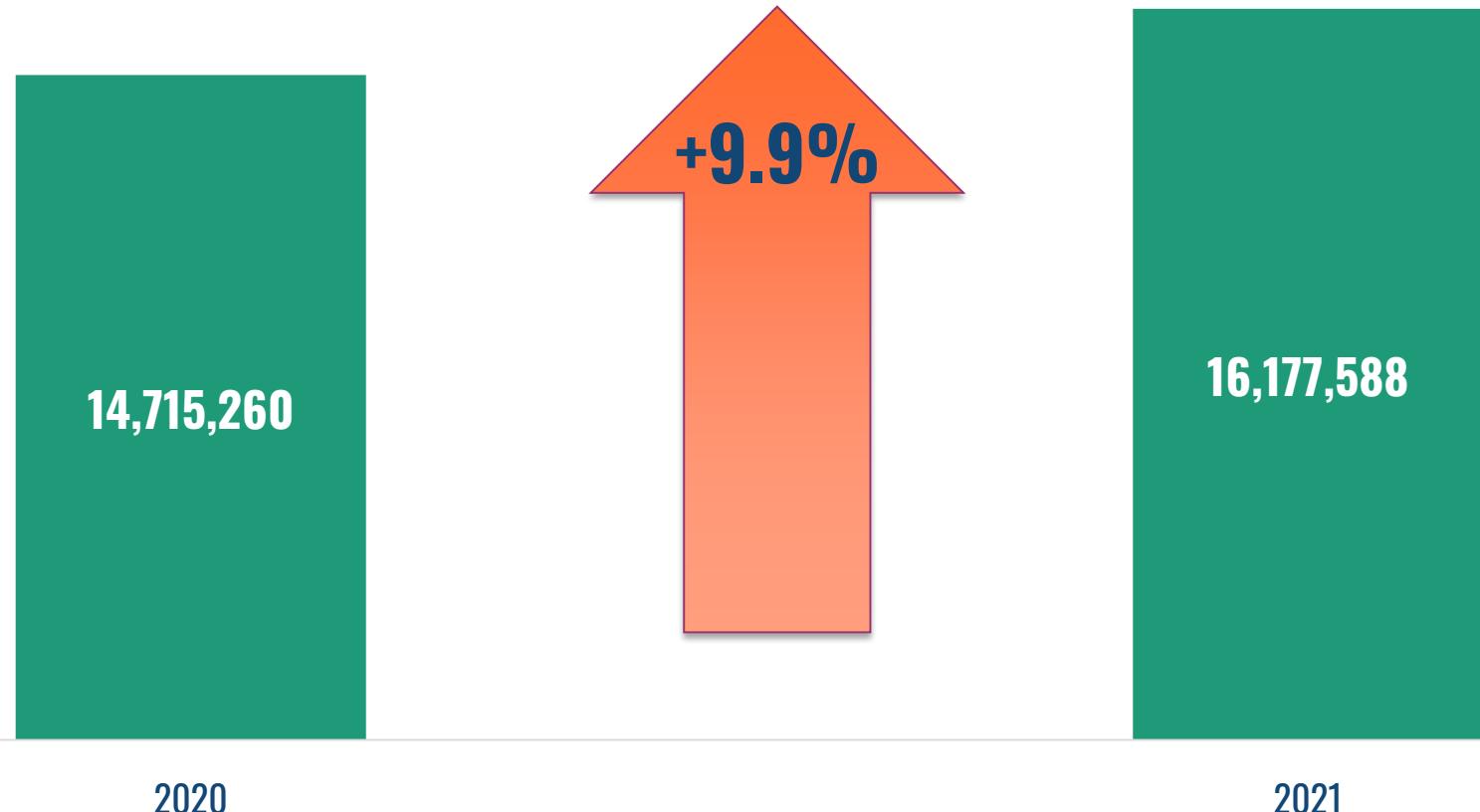


Notes: The Welcome Centers were closed March 18th – May 31st due to social distancing orders. The Centers started closing on weekends on 8/16/2020. (The centers were not open on weekends in 2019 from Jan – Mar). The Kansas City Welcome Center closed at the end of September, and the Hannibal and St. Louis Centers closed at the end of October. In November 2020, the centers switched to being open only Thursday – Monday. On 2/16/2021, the centers switched to being open only Tuesday – Saturday. On 4/11/2021, the centers resumed being open on Sundays with Mondays the only closed days. On 5/10/2021, the centers started opening 7 days a week.

Missouri Travel Barometer



Visitors to Missouri State Parks during January – August

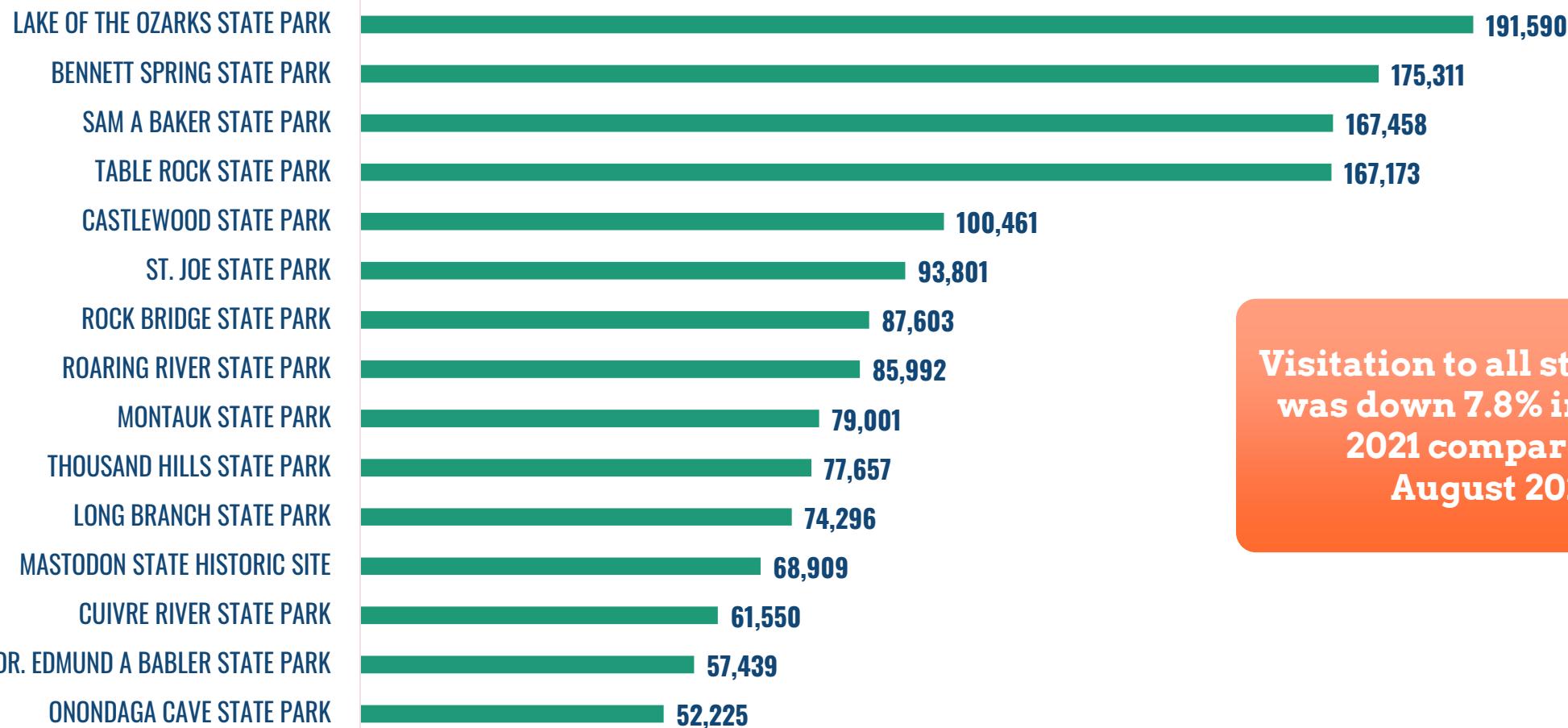


Source: Missouri State Parks

Missouri Travel Barometer



Most Visited Missouri State Parks during August 2021

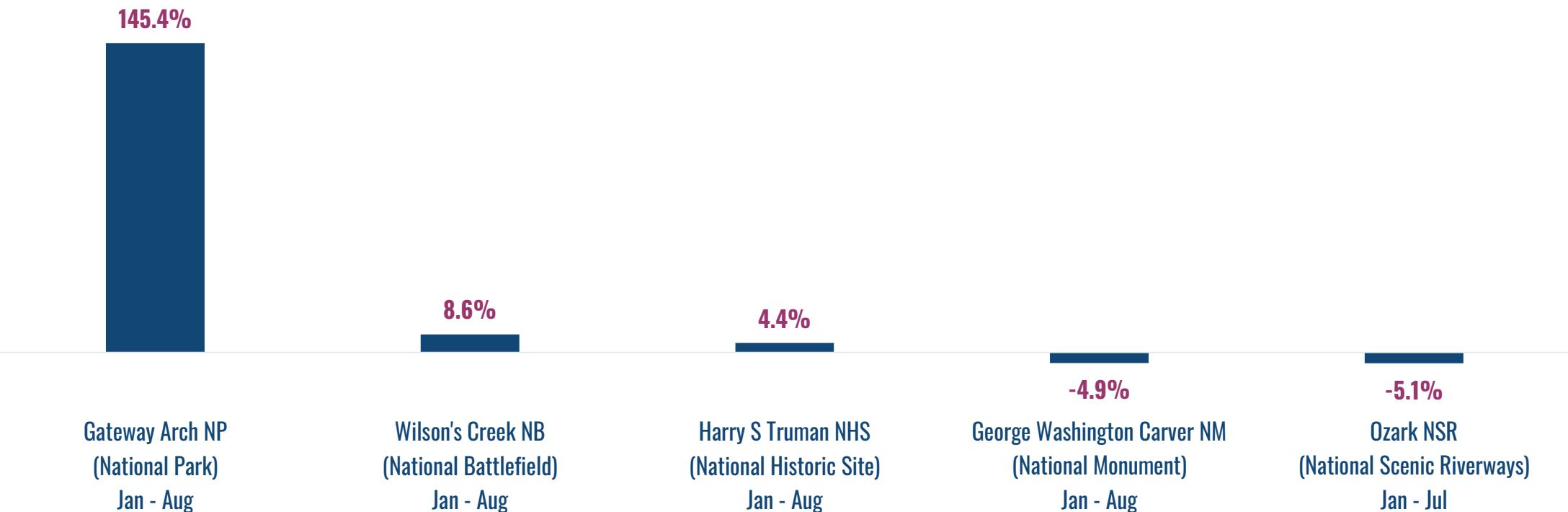


Visitation to all state parks
was down 7.8% in August
2021 compared to
August 2020

Missouri Travel Barometer



Missouri National Parks Attendance % of Change in Visits to Missouri National Parks 2021 Compared to 2020



Notes: The visitor centers at the Wilson's Creek NB, the George Washington Carver NM and the Harry S Truman NHS closed in mid-March 2020 due to Covid-19 precautions. Truman's home was also closed, but the farm grounds remained open. At the Gateway Arch NP, Tram Rides to the top of the Arch resumed on September 1, 2020 but the Old Courthouse remains closed for renovations.

Missouri Travel Barometer



KC & STL Airport Deplanements

Kansas City



+49.8% over CYTD20
-40.3% from CYTD19

■ 2019 ■ 2020 ■ 2021

St. Louis



+40.7% over CYTD20
-40.4% from CYTD19

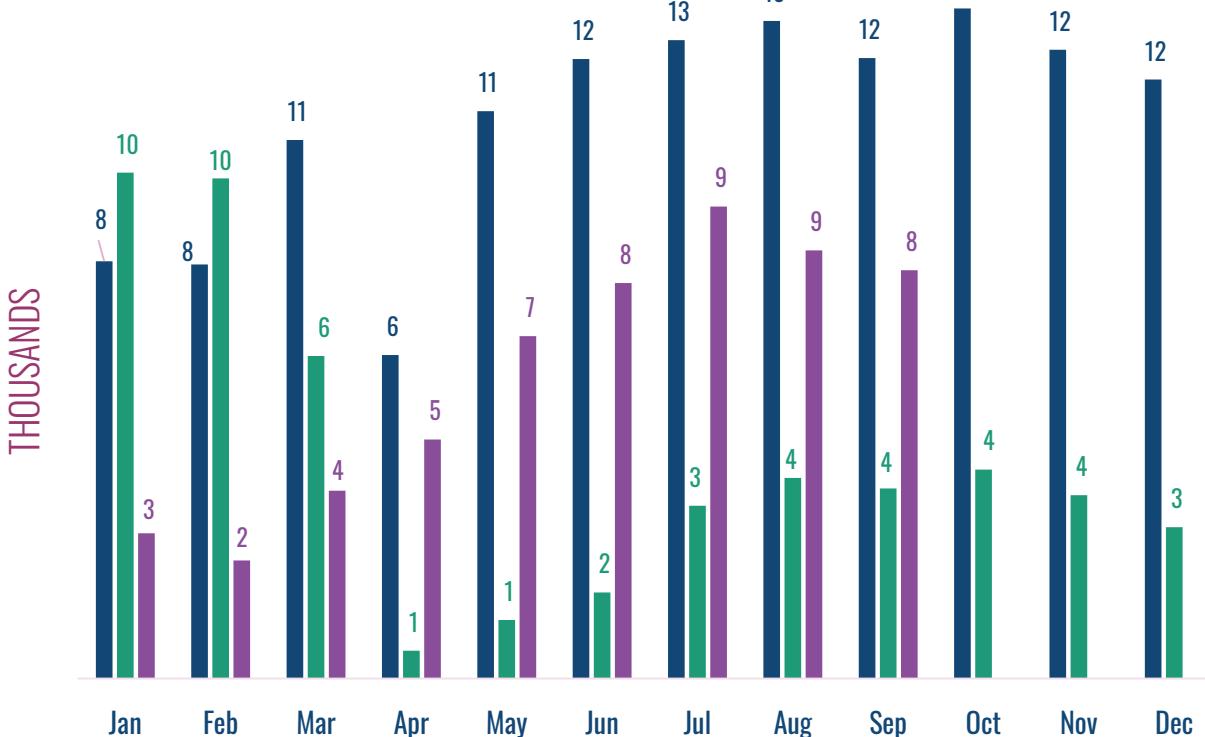
■ 2019 ■ 2020 ■ 2021

Missouri Travel Barometer



Columbia & Springfield Airport Deplanements

Columbia



Springfield



+32.6% from CYTD20
-42.9% from CYTD19

■ 2019 ■ 2020 ■ 2021

+57.3% over CYTD20
-21.4% from CYTD19

■ 2019 ■ 2020 ■ 2021

A photograph of a woman in a white kayak navigating through a turbulent, rocky river. She is wearing a pink top and black pants. The river is filled with large, grey, textured rocks. In the background, there is a dense forest of green trees under a clear blue sky.

THANK YOU